Excel 2364 – Assignment 3 /200

The files needed for the assignment are provided on the Learning Hub (Contents….Assignments).

These are not the Textbook (Chapter) Files.

No marks are given if the wrong files are used.

The number in parentheses represents marks available.

ASSIGNMENTS

Use these instructions for ALL your assignments. PLEASE ASK IF YOU NEED CLARIFICATION.

Submit the complete assignment to the **assignment** drop box in the Learning Hub www.learn.bcit.ca

Prior to submitting:

- All submitted assignments must be in good presentation order. Treat your work as if you are presenting to a current or potential employer or client. Marks will be deducted from the overall assignments for submissions not in a presentable format.
- Presentation format means it is suitable for distribution to an audience both on-screen and in print form. Use print preview to show what your assignment will look like. Each previewed page must not have any text, tables or charts cut off or orphaned. Orphan rows and columns must be fixed prior to submission. (5)
- Number/dates must all be **formatted** (be consistent) (example: 10000 is not formatted) (5)
- All worksheets must be left in **Normal view**. (5)
- Ensure all worksheets are placed in the order of the exercises and are labelled accordingly. (5)
- No additional sheets or files included. (5)
- Assignments are due as per the date in the drop box in the Learning Hub and on the course outline. (**10% subtracted if late**)
- All assignments must be completed individually.
- Late submissions must be agreed upon at least **48 hours prior to the due date**.
- Email of assignments will not be accepted. No exceptions. Only assignments submitted to the correct Learning Hub drop box will be marked. No printing is required.
- Check the course outline for % associated with your assignments.
- Additional exercises from the textbook or instructor may be added to assignments as required for the needs of the class. Additional work will be announced at the end of each session. Please ensure you are present to note additional work assignments.

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Assignment 3A

1. Open Merchandise.xlsx. **This is not the same as the one from the Chapter** and save it as **Assignment 3_LastNameFirstName.xlsx** (5)
2. Copy the **Revenue** worksheet four times. You now have five identical worksheets. (4)
3. Rename the second sheet to **By Category,** the third sheet **By Product,** the fourth sheet **By Category and Product** and the fourth sheet **My Pivot Table**. (8)
4. Change the tab colour the Revenue sheet to Blue. (2)

(#5-8 are using the Subtotal feature)

5. In the **Revenue** worksheet, calculate the sum of the Gross Revenue by Months. Collapse the data to only the show subtotals and grand total rows. (5)
6. In the **By Category** worksheet, calculate the sum of the Gross Revenue by Category. Collapse the data to only show subtotals and grand total rows. (5)
7. In the **By Product** worksheet, do a count of the number sold of each product *(not a sum of the Qty Sold)* (any of the columns can be used – the Grand Count should be 54). Collapse the data to only show subtotals and grand total rows. (5)
8. In the **By Category and Product** worksheet, do a sum of the Gross Revenue by Category and a **second Subtotal** by Product showing the sum of the Gross Revenue. Collapse the data to only show both subtotals and grand totals rows. (5)
9. In the **My Pivot Table** worksheet create a pivot table starting in J4 in the **same** worksheet to show the sum of the Gross Revenue for each Product by Category. (10)
10. Copy the My Pivot Table worksheet three times. Leave the original worksheet as is. Rename the second one **Pivot Chart,** the third one **Calculated Field** and the fourth one **Slicer**. (6)
11. In the **Pivot Chart** worksheet, create a pivot chart (column) and sum the Gross Revenue using the chart filters to limit the chart to the Products that contain **T-shirt** in the Category **Apparel. Change** the Y Axis to thousands. (10)
12. In the **Calculated Field** worksheet, complete the following: (6)
    a. Add a calculated field giving each a 5% Increase to the Retail Price (this is not a new column in the source); name these appropriately
    b. Add a second calculated field, using the calculate field created in a) to add the increase to the **Retail Price** to create a **New Retail Price.**
    c. Update the Pivot Table to show the **Category, Products** and **New Retail Price** only.

13. In the **Slicer** worksheet, complete the following: (10)
    a. Change the report layout to Tabular form.
    b. Change the style to Light Blue Pivot Style Medium 13
    c. Change to summarize by Average Gross Revenue.
    d. Insert a slicer for Category and **select** Souvenirs

How does this look? Are you proud enough of this to hand to your boss for a raise?

Go back to the instructions on the first page to make sure your work has met the criteria.

Assignment 3B

1. Open AutoSales.xlsx and move the **Finance** worksheet into your current workbook to the right of the **Slicer** worksheet. Copy and rename the first one **Finance – Original** and the second one **Finance.**(5)
2. In the **Finance** worksheet, create appropriate range names for Purchase Price (**cell C5**), Sales Tax (**cell C6**), Down Payment (**cell C7**), Months Financed (**C8**), APR (**cell C9**), Down Payment Amount (**cell C12**), Amount Financed (**cell C13**), and Tax-Owed (**cell C14**) (8)
3. Edit the existing name range **Tax_Owed** to display as **Tax**. (2)
4. Replace the existing formulas in C12:C15 using the new range names (example: replace C5 with Purchase_Price =C5*C7 will now be Purchase_Price*Down_Payment) (3)
5. Create a new worksheet and name it **Range Names**; Paste List of the range names in A1 (2)

DO NOT USE THE RANGE NAMES IN ANOTHER OTHER WORKSHEET.

How does this look? Are you proud enough of this to hand to your boss for a raise?

Keep saving! Use spell check!

Assignment 3C – Goal Seek (5) *(No partial marks)*

1. Copy the **Finance-Original** worksheet and put it to the right of the Range Names worksheet.
2. Rename the new worksheet **Goal Seek**
3. In the Goal Seek worksheet, use the Goal Seek to find the purchase price based on a monthly payment of $500.00 (the other variables will remain the same). *(Hint: How will I know you have used Goal Seek?)* **Accept the solution.**

How does this look? Is the formatting consistent?
Are you proud enough of this to hand to your boss for a raise?

Keep saving! Use spell check!

Assignment 3D – Data Tables (10) *(No partial marks)*

1. Copy the **Finance-Original** worksheet and put it to the right of the Goal Seek worksheet.
2. Rename the new worksheet **One-Variable Data Table.**
3. Start in **cell E5**. Complete the series of substitution values ranging from $20,000 to $75,000 at increments of $5,000 vertically down column E. Apply **Accounting style with two decimals** to the **range E5:E16** and preserve the thick bottom border on row 16. *(Are there any other cells that need the formatting updated?)*
4. Complete **F4:H4** using the appropriate cells (Down Payment, Tax, Monthly Payment) from the Output area.
5. Using the **One-Variable Data Table**, complete the F5:H16
6. Apply a Custom format to display descriptive headings in in F4:H4
7. Copy the One-Variable worksheet and rename it Two-Variable
8. In J4:M16, use the **Two-Variable Data Table** feature to determine what the monthly payments would be for the Purchase prices from $20,000 to $75,000 with down payments of $3,000, $5,000 and $10,000 as the second variable.

Assignment 3E – Scenario Summary (5) *(No partial marks)*

1. Using the **Finance – Original** worksheet, create a scenario summary for the following possibilities:
    a. **Best Case** – Purchase Price $40,000; Month Financed 36
    b. **Worst Case** – Purchase Price $50,000; Month Financed 72
    c. **Most Likely** – Purchase Price $45,000; Month Financed 60
2. **Generate a** Scenario Summary report showing the results for C15 (Monthly Payment).
3. **Move** the Scenario Summary report worksheet after the Data Tables worksheet.

Assignment 3F – Solver (10) *(No partial marks)*

Use the Finance – Original worksheet…….(NO Range names are to be used)

1. Set the objective to calculate a Monthly Payment of **$500**.
2. Use **Purchase Price** and **Months Financed** as changing variable cells.
3. Set constraints to ensure the Purchase Price is less than or equal to $50,000, greater than or equal to $30,000, and a whole number.
4. Set constraints to ensure months financed are less than or equal to 72 and greater than or equal to 24.
5. Solve the problem. Generate the Answer Report.
6. Move the Answer Report worksheet after the Scenario Summary worksheet.

How does this look? Is the formatting consistent?
Are you proud enough of this to hand to your boss for a raise?
Keep saving! Use spell check!

Assignment 3G – Financial Functions

1. Open the Statistical Functions.xlsx workbook and copy/move all worksheets to your current workbook (4)
2. Complete the Summary Statistics area (B21:C24 and B28:C30) in the Summary worksheet. *(Hint: By using the correct cell referencing you will only need to complete the cells in column B and drag the formulas to complete column C)* (14)
3. In the Map worksheet, insert a map chart using the data in A1:B6 (5)
4. In the Loan worksheet:
    a. Insert functions in the Output area using the data from the Input area (*reminder: do not use real numbers in your formulas*) (6)
    b. Enter the Beginning Balance in B8 by referencing the Output Area. (1)
    c. Enter the Monthly Payment in C8 by referencing the Input Area. (1)
    d. Use Financial functions to calculate:
        i. the Interest Paid (2)
        ii. Principal Paid (2)
        iii. Ending Balance in row 8 (this is a simple formula). (2)
        iv. Cumulative Interest (2)
        v. Cumulative Principle. (2)
    e. Complete the balance of the table. (2)
    f. Complete the total row (2)

How does this look? Is the formatting consistent?
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Keep saving! Use spell check!

Upload the <u>one</u> completed file to the Learning Hub Assignment 3 drop box.

No other files (i.e. docs, jpg, png) will be reviewed/marked.